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Report Highlights:

France is a big net importer of seafood. In 1999, France imported USD 2.15 billion more seafood than it exported, with total imports amounting to USD 3.20 billion. France's leading suppliers are the United Kingdom and Norway, accounting for almost 30 percent of French imports. The United States ranked sixth in 1999, with 4.4 percent market share, valued at USD 115 million. However, the United States was France's leading supplier of lobster, surimi, monkfish and dogfish in 1999. American exports of salmon to France continue to face stiff price competition with products from Norway and the United Kingdom. As a result, U.S. products' market share amounted to 7 percent in 1999, while products from Norway and the UK dominated the market (70 percent).

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Includes Trade Matrix: Yes
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Executive Summary	1
Section I: Situation and Outlook	1
Section II: Statistical Tables	2
PS&D Tables	2
Trade Matrices	9
Price Tables	17
Strategic Indicator Table	23
Tariff Table	25
Section III: Supply, Demand, Policy and Marketing	27
Production	27
1. Total Seafood Production	27
2. French Production by Species of interest	28
3. Surimi	29
Consumption	29
1. Total Seafood Consumption	29
2. Salmon	31
4. Lobster Consumption	32
5. Scallop Consumption	33
6. Surimi Consumption	33
8. Dogfish	34
9. Monkfish	34
Trade	35
Total	35
Salmon	36
Groundfish Fillets	36
Lobster	36
Scallops	36
Surimi	37
Dogfish and Monkfish	37
Marketing	37
Total Seafood	37
Organic	37
Salmon	38
Lobster, monkfish and dogfish	38

Executive Summary

France is a big net importer of seafood. In 1999, France imported USD 2.15 billion more seafood than it exported, with total imports amounting to USD 3.20 billion. France's leading suppliers are the United Kingdom and Norway, accounting for almost 30 percent of French imports. The United States ranked sixth in 1999, with 4.4 percent market share, valued at USD 115 million. However, the United States was France's leading supplier of lobster, surimi, monkfish and dogfish in 1999. American exports of salmon to France continues to face stiff price competition with products from Norway and the United Kingdom. As a result, U.S. products' market share amounted to 7 percent in 1999, while products from Norway and the UK dominated the market (70 percent).

Section I: Situation and Outlook

In 1999, France remained a net importer of seafood products, and a good market for U.S. producers. France imported USD 3.20 billion seafood products, including USD 115 million from the United States. In value terms, lobster, salmon and surimi were the leading American products exported to France, with 27, 16 and 15 percent market share, respectively. U.S. products lead the lobster and surimi markets, while they ranked third on the salmon market, following Norway and the United Kingdom.

Salmon is French consumers' favorite and most purchased finfish specie. U.S. salmon faces stiff competition from Norwegian and UK salmon. Farm-raised, salmon produced in Europe is available throughout the year and is exported fresh to France. By contrast, U.S. salmon is wild and its production therefore fluctuates according to natural conditions, and is exported frozen to France. In addition, the upcoming EU and French standards for organic salmon are likely to hurt U.S. products and favor Scottish and Irish products.

Lobster is a festive product in France, principally consumed at Christmas and New Year's Eve meals. American and Canadian products compete on the French market as the two leading lobster suppliers

Section II: Statistical Tables

PS&D Tables

PSD Table						
Country	France					
Commodity	Salmon, Whole/Eviscerated				(MT)	
	Revised	1999	Preliminary	2000	Forecast	2001
	Old	New	Old	New	Old	New
Market Year Begin		01/1999		01/2000		01/2001
Beginning Stocks	19700	19700	19300	32459	17900	32161
Total Production	0	2	0	2	0	2
Intra-EC Imports	38000	43880	38000	40000	0	40000
Other Imports	60000	77214	60000	70000	0	70000
TOTAL Imports	98000	121094	98000	110000	0	110000
TOTAL SUPPLY	117700	140796	117300	142461	17900	142163
Intra-EC Exports	7000	4064	7000	6000	0	7000
Other Exports	400	273	400	300	0	300
TOTAL Exports	7400	4337	7400	6300	0	7300
Domestic Consumption	88000	100000	89000	100000	0	100000
Other Use/Loss	3000	4000	3000	4000	0	4000
TOTAL Utilization	91000	104000	92000	104000	0	104000
Ending Stocks	19300	32459	17900	32161	0	30863
TOTAL DISTRIBUTION	117700	140796	117300	142461	0	142163

Note: salmon fillets are included in the salmon PS&D and trade matrices data because they represent a significant part of U.S. salmon exports to France. Both consumption and stocks were revised significantly up according to recent industry estimates.

PSD Table						
Country	France					
Commodity	Groundfish, Fillets				(MT)	
	Revised	1999	Preliminary	2000	Forecast	2001
	Old	New	Old	New	Old	New
Market Year Begin		01/1999		01/2000		01/2001
Beginning Stocks	1000	1000	900	2000	800	1000
Total Production	26000	36057	26000	32000	0	33000
Intra-EC Imports	16000	16616	16000	15000	0	15000
Other Imports	64000	61335	64000	60000	0	60000
TOTAL Imports	80000	77951	80000	75000	0	75000
TOTAL SUPPLY	107000	115008	106900	109000	800	109000
Intra-EC Exports	5000	4109	5000	4000	0	3000
Other Exports	100	198	100	100	0	100
TOTAL Exports	5100	4307	5100	4100	0	3100
Domestic Consumption	100000	106701	100000	102900	0	104000
Other Use/Loss	1000	2000	1000	1000	0	1000
TOTAL Utilization	101000	108701	101000	103900	0	105000
Ending Stocks	900	2000	800	1000	0	900
TOTAL DISTRIBUTION	107000	115008	106900	109000	0	109000

PSD Table						
Country	France					
Commodity	Lobster				(MT)	
	Revised	1999	Preliminary	2000	Forecast	2001
	Old	New	Old	New	Old	New
Market Year Begin		01/1999		01/2000		01/2001
Beginning Stocks	100	100	100	102	100	101
Total Production	301	420	301	400	0	400
Intra-EC Imports	2000	2665	2000	2600	0	2600
Other Imports	7000	7747	7000	7500	0	7500
TOTAL Imports	9000	10412	9000	10100	0	10100
TOTAL SUPPLY	9401	10932	9401	10602	100	10601
Intra-EC Exports	500	563	500	500	0	500
Other Exports	300	266	300	300	0	300
TOTAL Exports	800	829	800	800	0	800
Domestic Consumption	8500	10000	8500	9700	0	9700
Other Use/Loss	1	1	1	1	0	1
TOTAL Utilization	8501	10001	8501	9701	0	9701
Ending Stocks	100	102	100	101	0	100
TOTAL DISTRIBUTION	9401	10932	9401	10602	0	10601

PSD Table						
Country	France					
Commodity	Scallops				(MT)	
	Revised	1999	Preliminary	2000	Forecast	2001
	Old	New	Old	New	Old	New
Market Year Begin		01/1999		01/2000		01/2001
Beginning Stocks	1000	1000	1000	2825	1000	1765
Total Production	12200	12847	12200	12500	0	12500
Intra-EC Imports	4800	7423	4800	5000	0	5000
Other Imports	8800	9731	8800	9500	0	9500
TOTAL Imports	13600	17154	13600	14500	0	14500
TOTAL SUPPLY	26800	31001	26800	29825	1000	28765
Intra-EC Exports	2990	3041	2940	3000	0	3000
Other Exports	0	35	50	50	0	50
TOTAL Exports	2990	3076	2990	3050	0	3050
Domestic Consumption	22800	25000	22800	25000	0	25000
Other Use/Loss	10	100	10	10	0	10
TOTAL Utilization	22810	25100	22810	25010	0	25010
Ending Stocks	1000	2825	1000	1765	0	705
TOTAL DISTRIBUTION	26800	31001	26800	29825	0	28765

PSD Table						
Country	France					
Commodity	Surimi				(MT)	
	Revised	1999	Preliminary	2000	Forecast	2001
	Old	New	Old	New	Old	New
Market Year Begin		01/1999		01/2000		01/2001
Beginning Stocks	0	0	0	0	0	0
Total Production	0	19850	0	20000	0	20000
Intra-EC Imports	0	33	0	35	0	35
Other Imports	0	11741	0	11000	0	11000
TOTAL Imports	0	11774	0	11035	0	11035
TOTAL SUPPLY	0	31624	0	31035	0	31035
Intra-EC Exports	0	155	0	150	0	150
Other Exports	0	25	0	25	0	25
TOTAL Exports	0	180	0	175	0	175
Domestic Consumption	0	29400	0	29500	0	29600
Other Use/Loss	0	2044	0	1360	0	1260
TOTAL Utilization	0	31444	0	30860	0	30860
Ending Stocks	0	0	0	0	0	0
TOTAL DISTRIBUTION	0	31624	0	31035	0	31035

Note: Surimi stocks are not known and were therefore put at zero.

PS&D Table						
Country	France					
Commodity	Dogfish		(MT)			
	Revised	1999	Preliminary	2000	Forecast	
	Old	New	Old	New	Old	New
Market Year Begin		01/1999		01/2000		01/2001
Beginning Stocks		0		0		0
Total Production		9540		9500		9500
Intra-EU Imports		1176		1200		1200
Other Imports		4411		4500		4500
Total Imports		5587		5700		5700
TOTAL SUPPLY		15127		15200		15200
Intra-EU Exports		1033		1000		1000
Other Exports		1		1		1
Total Exports		1034		1001		1001
Domestic Consumption		13200		13200		13200
Other use/Loss		893		999		999
TOTAL Utilization		15127		15200		15200
Ending Stocks		0		0		0
TOTAL DISTRIBUTION		15127		15200		15200

Note: There is no stock estimate available are stocks were therefore put at zero.

PS&D Table						
Country	France					
Commodity	Monkfish		(MT)			
	Revised	1999	Preliminary	2000	Forecast	
	Old	New	Old	New	Old	New
Market Year Begin		01/1999		01/2000		01/2001
Beginning Stocks		0		0		0
Total Production		13130		13000		13000
Intra-EU Imports		4134		4000		4000
Other Imports		3445		3500		3500
Total Imports		7579		7500		7500
TOTAL SUPPLY		20709		20500		20500
Intra-EU Exports		1255		1200		1200
Other Exports		16		10		10
Total Exports		1271		1210		1210
Domestic Consumption		19709		19500		19500
Other use/Loss		1000		1000		1000
TOTAL Utilization		20709		20500		20500
Ending Stocks		0		0		0
TOTAL DISTRIBUTION		20709		20500		20500

Note: There is no stock estimate available are stocks were therefore put at zero.

Trade Matrices

Export Trade Matrix			
Country	France		
Commodity	Salmon, Whole/Eviscerated		
Time period	Jan-Dec	Units:	MT
Exports for:	1998		1999
U.S.	18	U.S.	0
Others		Others	
Belgium	1650	Belgium	1686
UK	4092	Italy	519
Netherlands	449	Spain	498
Spain	339	Luxemburg	321
Italy	337	UK	312
Germany	262	Germany	227
Denmark	192	Netherlands	225
Portugal	166	Denmark	184
Russia	99		
Switzerland	78		
Total for Others	7664		3972
Others not Listed	339		365
Grand Total	8021		4337

Import Trade Matrix			
Country	France		
Commodity	Salmon, Whole/Eviscerated		
Time period	Jan-Dec	Units:	MT
Imports for:	1998		1999
U.S.	6538	U.S.	8716
Others		Others	
Norway	46943	Norway	59670
UK	20113	UK	27143
Denmark	7689	Denmark	6614
Ireland	5359	Ireland	6198
Chile	3492	Chile	2889
Sweden	1345	Faroe	2875
Germany	1339	Canada	1736
Spain	1222	Spain	1641
Canada	1217	Sweden	948
Faroe	654	China	620
Total for Others	89373		110334
Others not Listed	1165		2044
Grand Total	97076		121094

Export Trade Matrix			
Country	France		
Commodity	Groundfish, Fillets		
Time period	Jan-Dec	Units:	MT
Exports for:	1998		1999
U.S.	0	U.S.	0
Others		Others	
Germany	1165	Belgium	1007
Belgium	871	Germany	895
Spain	766	Italy	593
Netherlands	739	Spain	398
Italy	616	UK	366
UK	394	Netherlands	353
Austria	308	Denmark	204
Denmark	131	Austria	178
Poland	62	Switzerland	24
Switzerland	54	Poland	19
Total for Others	5106		4037
Others not Listed	232		270
Grand Total	5338		4307

Import Trade Matrix			
Country	France		
Commodity	Groundfish, Fillets		
Time period	Jan-Dec	Units:	MT
Imports for:	1998		1999
U.S.	1430	U.S.	2391
Others		Others	
Russia	14682	China	17262
China	13371	Norway	10338
Argentina	9109	Argentina	8470
Norway	7542	Russia	8438
Germany	6585	Germany	6716
Iceland	5784	Poland	3889
UK	4546	Iceland	3760
Poland	3934	Denmark	3276
Peru	2960	UK	3163
Faroe	2183	South Africa	1572
Total for Others	70696		66884
Others not Listed	9375		8676
Grand Total	81501		77951

Export Trade Matrix			
Country	France		
Commodity	Lobster		
Time period	Jan-Dec	Units:	MT
Exports for:	1998		1999
U.S.	2	U.S.	0
Others		Others	
Japan	303	Japan	219
Germany	120	Germany	123
Belgium	114	Spain	122
Italy	110	Italy	110
Spain	76	Belgium	92
Switzerland	54	UK	30
UK	13	Switzerland	25
Portugal	5	Portugal	17
Total for Others	795		738
Others not Listed	45		91
Grand Total	842		829

Import Trade Matrix			
Country	France		
Commodity	Lobster		
Time period	Jan-Dec	Units:	MT
Imports for:	1998		1999
U.S.	1901	U.S.	2421
Others		Others	
Canada	2644	Canada	1732
Bahamas	959	Cuba	983
Cuba	843	Spain	963
UK	841	UK	898
Spain	477	Bahamas	723
Ireland	340	Belgium	347
South Africa	136	Australia	284
Brazil	136	Ireland	208
Belgium	131	South Africa	175
Mexico	123	Mexico	123
Total for Others	6630		6436
Others not Listed	69		1555
Grand Total	8600		10412

Export Trade Matrix			
Country	France		
Commodity	Scallops		
Time period	Jan-Dec	Units:	MT
Exports for:	1998		1999
U.S.	0	U.S.	0
Others		Others	
Spain	1748	Spain	1369
Belgium	543	Italy	461
Italy	429	Belgium	456
Germany	124	Denmark	225
Netherlands	116	UK	215
UK	68	Germany	142
Total for Others	3028		2868
Others not Listed	89		208
Grand Total	3117		3076

Import Trade Matrix			
Country	France		
Commodity	Scallops		
Time period	Jan-Dec	Units:	MT
Imports for:	1998		1999
U.S.	760	U.S.	756
Others		Others	
Peru	3398	UK	5652
UK	3315	Peru	2530
Chile	1708	Chile	2066
Argentina	1232	Argentina	1198
Belgium	775	Iceland	807
Iceland	706	Canada	529
Russia	647	Belgium	490
Canada	383	New Zealand	439
Faroe	372	Ireland	439
New Zealand	289	Greenland	401
Total for Others	12825		14551
Others not Listed	1591		1847
Grand Total	15176		17154

Export Trade Matrix			
Country	France		
Commodity	Fish,Urchin Roe/Caviar,Livers		
Time period	Jan-Dec	Units:	MT
Exports for:	1998		1999
U.S.	1	U.S.	2
Others		Others	
Netherlands	185	Germany	262
Norway	161	Norway	78
Germany	148	Belgium	45
Iceland	80	Denmark	42
Total for Others	574		427
Others not Listed	192		165
Grand Total	767		594

Import Trade Matrix			
Country	France		
Commodity	Fish,Urchin Roe/Caviar,Livers		
Time period	Jan-Dec	Units:	MT
Imports for:	1998		1999
U.S.	528	U.S.	417
Others		Others	
Iceland	781	Iceland	637
Belgium	405	Sweden	352
Denmark	309	Belgium	342
Sweden	306	Denmark	282
UK	258	Germany	155
Mauritania	96	Netherlands	108
Spain	94		
Total for Others	2249		1876
Others not Listed	529		433
Grand Total	3306		2726

Export Trade Matrix			
Country	France		
Commodity	Surimi		
Time period	Jan-Dec	Units:	MT
Exports for:	1998		1999
U.S.	0	U.S.	0
Others		Others	
Spain	276	UK	113
UK	119	Estonia	20
Belgium	24	Italy	13
Italy	21	Spain	11
		Luxemburg	10
Total for Others	440		167
Others not Listed	12		13
Grand Total	452		180

Import Trade Matrix			
Country	France		
Commodity	Surimi		
Time period	Jan-Dec	Units:	MT
Imports for:	1998		1999
U.S.	7017	U.S.	8553
Others		Others	
Argentina	615	Chile	877
Chile	594	Argentina	625
Ecuador	125	Peru	508
Canada	89	Canada	428
Belgium	22	Russia	337
Russia	20	Thailand	167
		India	166
		Azerbaijan	40
		South Korea	39
		Belgium	15
Total for Others	1465		3202
Others not Listed	10		19
Grand Total	8492		11774

Export Trade Matrix				Import Trade Matrix			
Country:	France	Units:	Metric Tons	Country:	France	Units:	Metric Tons
Commodity:	Dogfish			Commodity:	Dogfish		
Time Period:	Jan-Dec			Time Period:	Jan-Dec		
Exports for	1998		1999	Imports for	1998		1999
U.S.	0	U.S.	0	U.S.	4458	U.S.	3771
Others		Others		Others		Others	
Italy	882	Italy	822	UK	690	UK	680
Belgium	94	Belgium	77	Canada	282	Canada	363
Spain	74	Spain	51	Faroe	115	Denmark	165
Portugal	26	Portugal	30	Ireland	114	Spain	162
Netherlands	23	Netherlands	20	Denmark	79	Ireland	111
				Venezuela	53	Taiwan	40
				Spain	52	Venezuela	37
				Oman	51	Norway	31
				Norway	43	Faroe	18
Total for Others	1099		1000	Total for Others	1479		1481
Others not Listed	21		34	Others not Listed	147		335
Grand Total	1120		1034	Grand Total	6084		5587

Export Trade Matrix				Import Trade Matrix			
Country:	France	Units:	Metric Tons	Country:	France	Units:	Metric
Commodity:	Monkfish			Commodity:	Monkfish		Tons
Time Period:	Jan-Dec			Time Period:	Jan-Dec		
Exports for	1998		1999	Imports for	1998		1999
U.S.	0	U.S.	0	U.S.	2828	U.S.	1728
Others		Others		Others		Others	
Spain	567	Spain	642	UK	2571	UK	2537
Germany	313	Germany	206	China	603	Ireland	868
Italy	311	Italy	203	Ireland	600	China	677
Belgium	147	Luxemburg	104	South Africa	241	Spain	384
				Spain	216	Namibia	367
				Belgium	112	Brazil	228
				Netherlands	101	South Africa	209
						Belgium	166
Total for Others	1338		1155	Total for Others	4444		5436
Others not Listed	55		116	Others not Listed	463		415
Grand Total	1393		1271	Grand Total	7735		7579

Price Tables

Prices Table			
Country	France		
Commodity	Salmon, Whole/Evisc erated		
Prices in	FF	per uom	Kg
Year	1998	1999	% Change
Jan	25.2	25.4	0.79%
Feb	25.4	25.5	0.39%
Mar	26.1	25.6	-1.92%
Apr	28.2	27.1	-3.90%
May	29	27.8	-4.14%
Jun	31.3	27.5	-12.14%
Jul	29.3	27	-7.85%
Aug	25.4	27	6.30%
Sep	25.1	27	7.57%
Oct	24.8	26.3	6.05%
Nov	25.8	25.9	0.39%
Dec	26	27.6	6.15%
Exchange Rate	6.15	Local currency/US \$	

Note: Above prices are wholesale prices recorded in France's leading wholesale market (Rungis) for Norwegian salmon.

Prices Table			
Country	France		
Commodity	Groundfish, Filletts		
Prices in	FF	per uom	Kg
Year	1998	1999	% Change
Jan	19.6	23.9	21.94%
Feb	20.3	23.2	14.29%
Mar	19.6	23.7	20.92%
Apr	19.7	22.4	13.71%
May	20.6	21.6	4.85%
Jun	21.6	22.7	5.09%
Jul	21.1	19.3	-8.53%
Aug	19.5	19	-2.56%
Sep	21.2	20.1	-5.19%
Oct	22.7	21.6	-4.85%
Nov	23.7	24.2	2.11%
Dec	22.8	25.7	12.72%
Exchange Rate	6.15	Local currency/US \$	

Note: Above prices are wholesale prices recorded in Rungis market for imported coalfish fillets.

Prices Table			
Country	France		
Commodity	Lobster		
Prices in	FF	per uom	Kg
Year	1998	1999	% Change
Jan	102	88.3	-13.43%
Feb	101	98.6	-2.38%
Mar	123	111	-9.76%
Apr	114	115	0.88%
May	94.8	90.7	-4.32%
Jun	87.7	105	19.73%
Jul	93	106	13.98%
Aug	97.5	101	3.59%
Sep	94.2	97.7	3.72%
Oct	85	96.3	13.29%
Nov	86.4	97.3	12.62%
Dec	88	99	12.50%
Exchange Rate	6.15	Local currency/US \$	

Note: Above prices are wholesale prices recorded in Rungis market for lobster imported from Canada.

Prices Table			
Country	France		
Commodity	Scallops		
Prices in	FF	per uom	Kg
Year	1998	1999	% Change
Jan	140	158	12.86%
Feb	115	119	3.48%
Mar	106	106	0.00%
Apr	123	123	0.00%
May	107	121	13.08%
Jun	103	119	15.53%
Jul	119	114	-4.20%
Aug	112	116	3.57%
Sep	112	125	11.61%
Oct	114	130	14.04%
Nov	143	133	-6.99%
Dec	166	155	-6.63%
Exchange Rate	6.15	Local currency/US \$	

Note: Above prices are wholesale prices recorded in Rungis market for imported shelled scallops.

Prices Table			
Country	France		
Commodity	Dogfish		
Prices in	FF	per uom	Kg
Year	1998	1999	% Change
Jan	31.4	32.2	2.55%
Feb	30.8	30	-2.60%
Mar	33.6	30.3	-9.82%
Apr	36.3	30.2	-16.80%
May	33.3	29.1	-12.61%
Jun	30.5	31.7	3.93%
Jul	31.1	31.2	0.32%
Aug	28.1	29.8	6.05%
Sep	31.9	29.9	-6.27%
Oct	30.3	35.7	17.82%
Nov	31.7	33.1	4.42%
Dec	30.3	31.9	5.28%
Exchange Rate	6.15	Local currency/US \$	

Note: Above prices are wholesale prices recorded in Rungis market for imported dogfish.

Prices Table			
Country	France		
Commodity	Monkfish		
Prices in	FF	per uom	Kg
Year	1998	1999	% Change
Jan	84.1	82.5	-1.90%
Feb	53	64.6	21.89%
Mar	74.8	68.1	-8.96%
Apr	70.1	65.9	-5.99%
May	65.5	70.2	7.18%
Jun	72.5	76.7	5.79%
Jul	73.3	67.9	-7.37%
Aug	64.3	63.9	-0.62%
Sep	66.8	79.6	19.16%
Oct	77.2	96.2	24.61%
Nov	70.5	88.8	25.96%
Dec	91.2	94.4	3.51%
Exchange Rate	6.15	Local currency/US \$	

Note: Above prices are wholesale prices recorded in Rungis market for imported monkfish.

Strategic Indicator Table

FISHERY PRODUCTS STRATEGIC INDICATOR TABLE					
		1999	2000	2001	
		Previous	Current	Next	5 Year
		Year	Year	Year	Projections
U.S. Competitive Position	Measurement *	Situation	Situation	Expectations	Expectations
U.S. Access Relative to Rest of World- Non-Tariff Measures (NTM)	Worse, equal, or better (choose one)	equal	equal	equal	equal
U.S. Access Relative to Rest of World - Tariffs	Higher, equal, or lower (choose one)	equal	equal	equal	equal
Presence of Marketing Programs (domestic and 3rd country) versus U.S. programs	More aggressive, about the same, or less aggressive (select one)	more aggressive (Domestic, Norway & Scotland)	more aggressive	more aggressive	more aggressive
U.S. Prices Relative to Domestic and 3rd Country Prices	Higher, equal, or lower (choose one)	equal-lower	equal-lower	equal-lower	equal-lower
U.S. Market Share (3 Year. Average)	Percent	4	4.4	4.6	5 to 7
		Previous	Current	Next	5 Year
		Year	Year	Year	Projections/
Market Attractiveness	Measurement *	Situation	Situation	Expectations	Expectations
Per Capita Consumption of All Fishery Products	Kg per person	21	21	21	22 to 23
Per Capita Consumption of animal proteins (excluding fishery products)	Kg per person	92 meat + 111 diary	92 meat + 111 diary	92 meat + 111 diary	203 to 205 total
Percent of population with refrigerators	Percent	99.9	99.9	99.9	99.9
Percent of fishery product sales at supermarkets	Percent	66 fresh products and 90 smoked products	66 fresh products and 90 smoked products	66 fresh products and 90 smoked products	70 fresh and 95 smoked
Percent of total food sales at supermarkets	Percent	70	70	70	75
Percent of animal protein sales at supermarkets (excluding fishery products)	Percent	77	77	78	80
Percent of fishery sales at HRI establishments	Percent	15	15	15	15

Percent of fishery sales at open markets	Percent	n/a	n/a	n/a	n/a
* If an explanation of rating is needed, insert a row and provide an explanation in the row below.					

Tariff Table

Customs Codes Salmon	Tariffs 2000 (June 1-Dec 31)
03 02 12 00	2
03 02 19 00	8
03 03 10 00	2
03 03 22 00	2
03 03 29 00	9
03 04 10 13	2
03 04 20 13	2

Customs Codes Lobster	Tariffs 2000 (June 1-Dec 31)
03 06 11 10	12.5
03 06 11 90	12.5
03 06 21 00	12.5
03 06 12 10	6
03 06 12 90	16
03 06 22 10	8
03 06 22 91	8
03 06 22 99	10

Customs Codes Groundfish Fillets	Tariffs 2000 (June 1-Dec 31)
03 04 10 31	18
03 04 20 21	7.5
03 04 20 29	7.5
03 04 20 31	7.5
03 04 20 33	7.5
03 04 20 41	7.5
03 04 20 55	7.5
03 04 20 58	7.5
03 04 20 59	7.5
03 04 20 85	15

Customs Codes Scallops	Tariffs 2000 (June 1-Dec 31)
03 07 21 00	8
03 07 29 10	8
03 07 29 90	8

Customs Codes Surimi	Tariffs 2000 (June 1-Dec 31)
03 04 90 05	15

Customs Codes Fish Roe	Tariffs 2000 (June 1-Dec 31)
03 02 70 00	10
03 03 80 10	0
03 03 80 90	10
03 05 20 00	11
16 04 30 10	20
16 04 30 90	20

Customs Codes Monkfish	Tariffs 2000 (June 1-Dec 31)
03 02 69 81	15
03 03 79 81	15
03 04 20 83	15
03 04 90 57	7.5

Customs Codes Dogfish	Tariffs 2000 (June 1-Dec 31)
03 02 65 20	6
03 02 65 50	6
03 02 65 90	8
03 03 75 20	6
03 03 75 50	6
03 03 75 90	8
03 04 20 61	7.5
03 04 20 69	7.5

Section III: Supply, Demand, Policy and Marketing

Production

1. Total Seafood Production

French seafood production includes wild catch and aquaculture production. According to the French Ministry of Agriculture and Fisheries (MinAg), the French Center for Foreign Trade (CFCE) and the French Seafood Board (OFIMER), total French seafood production was the following in 1998 (1999 data are not available, to date):

	1998 (final)	
	Quantity (MT)	Value (million USD)
Finfish	277,271	638.0
Crustaceans	17,648	85.4
Shellfish	46,710	70.4
Cephalopods	21,297	60.7
Sea Weeds	15,382	3.7
TOTAL FRESH WILD CATCH	378,307	858.2
Frozen Tropical Tuna	105,632	132.5
Mini Freezers	52,775	34.1
Industrial Fishing	13,484	18.4
TOTAL FROZEN WILD CATCH	171,891	185.0
TOTAL FRESH+FROZEN WILD CATCH	550,198	1,043.2
Shellfish Farming	201,650	352.9
Fish farming	63,916	216.2
TOTAL AQUACULTURE	265,566	569.2
GRAND TOTAL	817,764	1,628.5

Note: 1 USD = 5.90 FF in 1998

Data is available on OFIMER's Web site: <http://www.ofimer.fr>

A large amount of fresh wild catch is sold on auction markets in French ports. According to OFIMER, 138,931 MT (valued at USD 310 million) were sold at auction markets during the first half of 2000, stable from 138,483 MT (USD 340 million) sold during the first half of 1999.

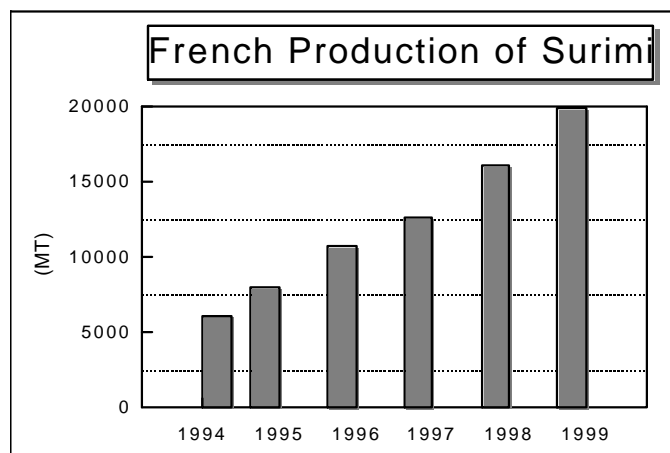
2. French Production by Species of interest

The following table describes French wild catch sold at auction markets and in other markets for species or aggregates of interest:

		1998 (revised)		1999 (preliminary)	
		MT	1,000 \$	MT	1,000 \$
Salmon		1	8	2	106
Groundfish	Cod	16,086	41,239	16,169	47,908
	Haddock	4,680	8,176	4,308	7,689
	Coalfish	20,828	33,147	31,058	32,766
	Whiting	25,761	30,529	30,734	35,691
	Hake	9,885	42,694	7,874	35,985
	Total Whole Fish	77,240	155,785	90,143	160,039
	Total in Fillet Equivalent	30,896	-	36,057	-
Lobster	Homarus	230	4,286	358	5,858
	Crayfish	90	2,929	62	2,189
	Total Lobster	320	7,215	420	8,047
Scallops		12,682	36,012	12,847	35,456
Dogfish		9,647	23,852	9,540	14,442
Monkfish		15,015	69,988	13,130	73,477

Note: There is 1 kg fillets in 2.5 kg whole fish.

3. Surimi



According to ADISUR (Association for the Development of the Surimi Industry), French surimi production has increased significantly since 1994, as shown in the opposite graph.

French surimi processing companies are Comaboko, Cuisimer, Fleury Michon, Narvik, and Protimer.

Consumption

1. Total Seafood Consumption

a. French Household Consumption:

French seafood consumption includes household consumption and institutional use. The consumer survey agency SECODIP estimates that French households' consumption of seafood products included the following in 1998 and 1999:

		1998		1999	
		Quantity (MT)	Value (Million USD)	Quantity (MT)	Value (Million USD)
Fresh Finfish	Cuts	80,248	877	77,204	821
	Whole	61,841	490	59,486	464
	Total	142,089	1,367	136,690	1,285
Fresh Crustaceans		30,689	368	30,969	368
Fresh Shellfish & Cephalopods		99,824	407	95,866	379

Catered Seafood	incl. surimi, marinades, roe, preparations and soups	31,810	322	35,256	337
Smoked, Salted and Dried Seafood		25,616	430	25,980	425
Frozen Seafood	Frozen Finfish	64,393	435	64,063	447
	Prepared Meals	27,869	199	26,899	193
	Crustaceans	10,721	119	10,760	118
	Shellfish	7,060	94	7,092	100
	Surimi	1,985	13	2,115	12
	Cephalopods	2,036	12	2,023	11
	Other	7,444	50	6,999	48
	Total	121,508	922	119,951	929
Canned Seafood	Canned Finfish	89,247	625	98,842	661
	Canned Shellfish	2,445	25	2,042	22
	Canned Crustaceans	2,846	41	2,820	42
	Total Canned	94,538	691	103,704	725
TOTAL		546,074	4,507	548,416	4,448

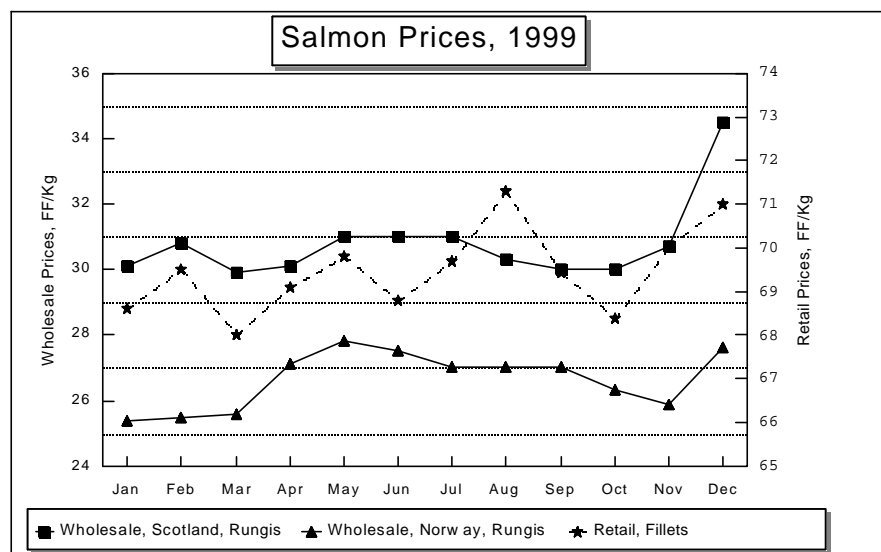
b. Institutional Consumption:

There is generally no survey conducted on institutional consumption of seafood. However, the French seafood board (OFIMER) and a private consultant (GIRA) studied French institutional consumption of seafood in 1998. They estimated it at 196,300 MT, for a value of USD 1.24 billion, and it included the following:

1998	Quantity (MT)	Value (Million USD)
Finfish	110,584	713
Crustaceans	13,758	143
Shellfish	49,894	226
Catering	9,800	64
Canned	8,500	46
Other	3,764	48
Total	196,300	1,240

2. Salmon

Salmon Prices:



The opposite graph shows wholesale prices on the Paris wholesale market Rungis for salmon imported from Scotland and from Norway in 1999, as well as average retail prices.

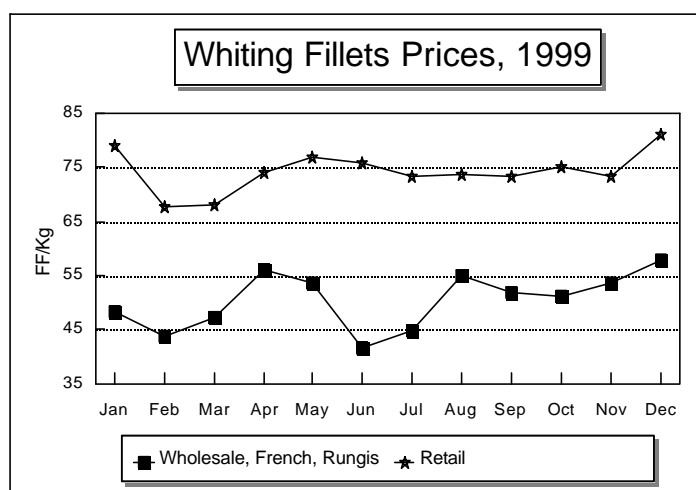
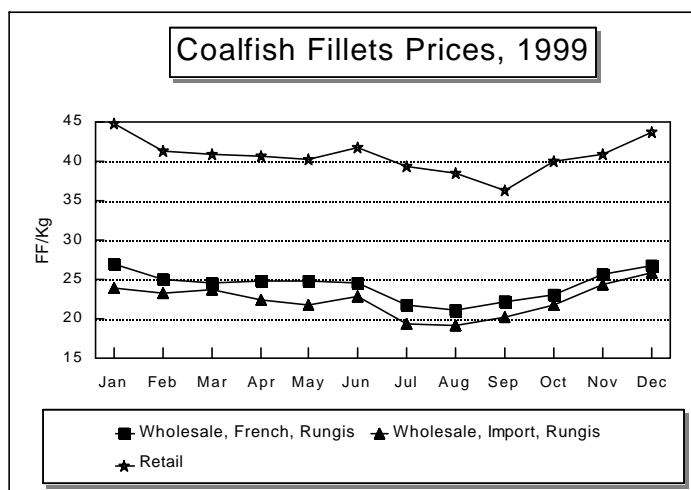
Salmon consumption peaks in December, when salmon is consumed as a festive product, and salmon prices are therefore high at that time.

According to the consumer survey agency SECODIP, French households' consumption of salmon was distributed as follows in 1999:

- 22,623 MT fresh salmon (USD 211 million) including 14,810 MT salmon cuts (USD 165 million) and 7,812 MT whole salmon (USD 46 million);
- 13,275 MT smoked salmon (USD 287 million);
- and frozen salmon consumption data are not available.

According to a survey recently conducted for the International Salmon Fishermen Association (ISFA), French consumers' leading purchasing criteria for salmon are a constant quality, food safety, and fast logistics.

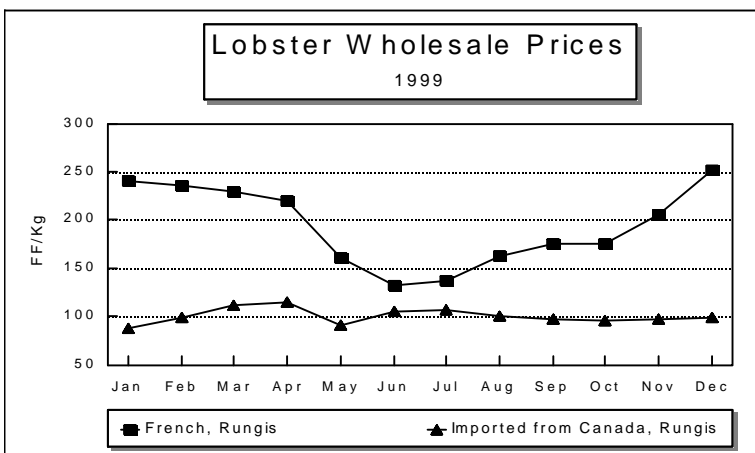
3. Groundfish Fillet Consumption



The decline in fillet prices recorded during summer results from the reduction in fillet consumption in France during that period of the year. In summer time, the French prefer to purchase whole finfish to grill, rather than fillets.

4. Lobster Consumption

Lobster Prices:



There were no retail prices available and only data on Canadian lobster was presented, not American lobster. However, prices for Canadian and American lobsters are likely to be close on the Paris wholesale market in Rungis and are significantly lower than domestic products' prices.

High prices in November and December are due to the seasonal high demand for lobster as a festive product consumed for Christmas and New Year's Eve.

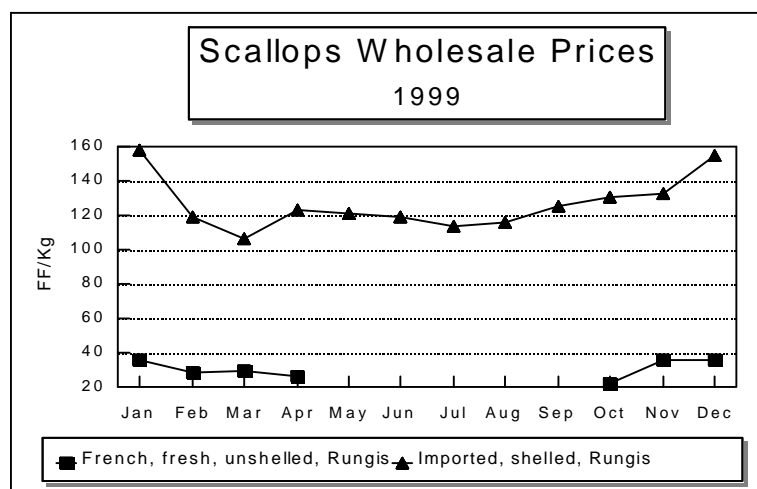
The price decline in May for domestic products results from the high seasonal production. Domestic catch remained high in June and July, which maintained prices at low levels. From October to the end of the year, low domestic catch boosted prices.

According to SECODIP, French household consumption of fresh lobster was the following in 1998 and 1999:

	1998		1999	
	MT	1,000 USD	MT	1,000 USD
Spiny Lobster	1,144	29	935	26
Homarus	805	13	673	10
Total Lobster	1,949	42	1,208	36

5. Scallop Consumption

Scallop Prices:



Scallops are not domestically-caught from May to September, which explains why there are no prices indicated for that period of time in the opposite graph. Wholesale prices for scallops are the highest in December, since they are festive products principally consumed for Christmas and New Year's Eve. There is an increasing quantity of imported shelled scallops on the French market, since they are ready-to-cook products, although they are more expensive.

In 1999, average retail prices amounted to FF 56/kg, including FF 39/kg for unshelled scallops and FF 130/kg for shelled scallops.

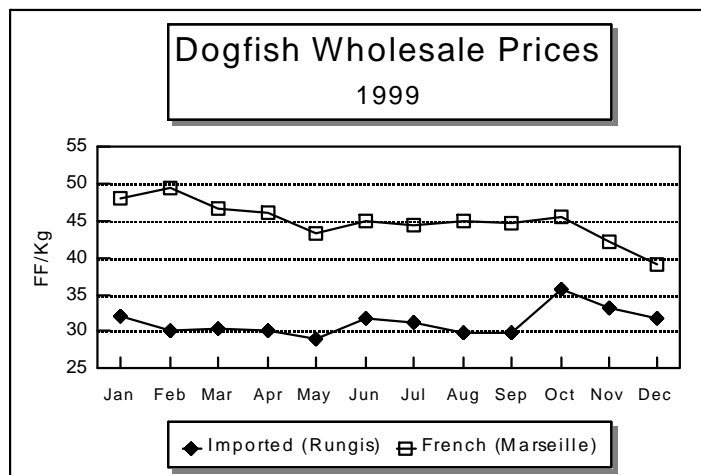
French household consumption of scallops increased from 5,407 MT (USD 49.2 million) in 1998 to 5,971 MT (USD 54.5 million) in 1999.

6. Surimi Consumption

French consumption of surimi is growing fast, as the sector is actively innovative in terms of packaging: surimi is a consumer-ready product with a good nutritional value and sold at relatively low retail prices compared to other seafood products (around 60 FF/kg, or 8.5 USD per kilogram). Total surimi consumption was estimated at 23,950 MT, including 14,673 MT households consumption of fresh products and 2,115 MT of frozen surimi. Surimi is mainly purchased in sticks (63 percent), and mini sticks (17 percent).

8. Dogfish

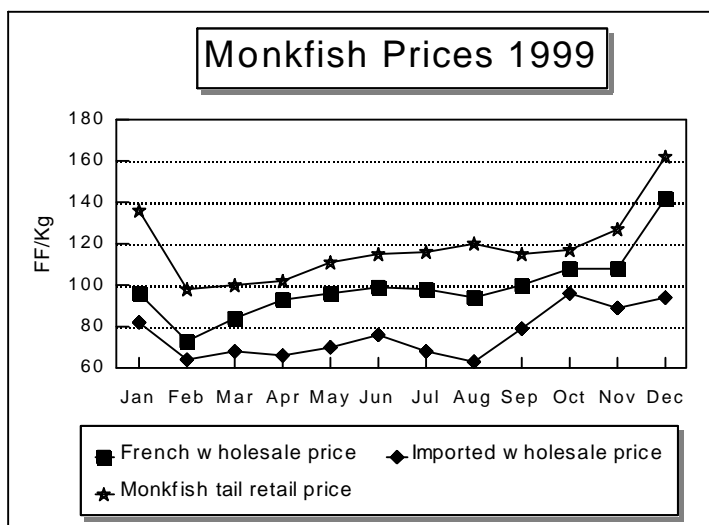
Dogfish Prices:



Prices for domestically-caught dogfish remained high in 1999 because production was abnormally low. The price decline in October and November for both imported and domestically-caught products is due to the low French demand for dogfish during that period of time, when festive products are preferred.

9. Monkfish

Monkfish Prices:

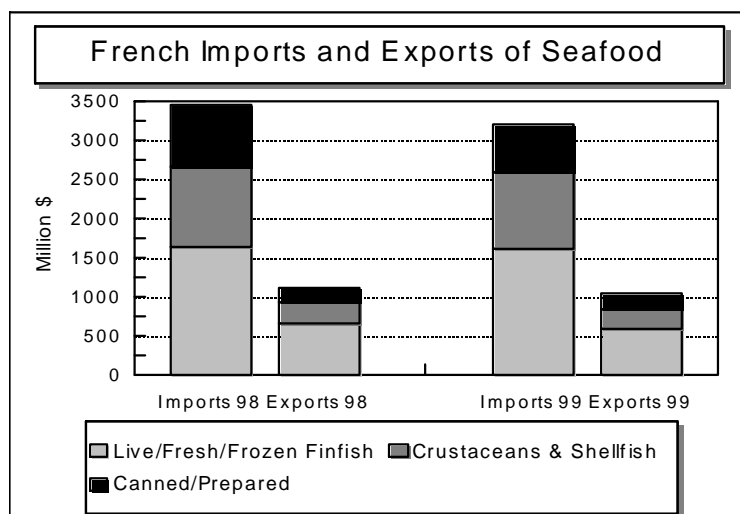


In 1999, French domestic catch of monkfish was lower than average, and wholesale prices were therefore at relatively high levels compared to the past years.

Like all festive products, monkfish prices were the highest in December.

Trade

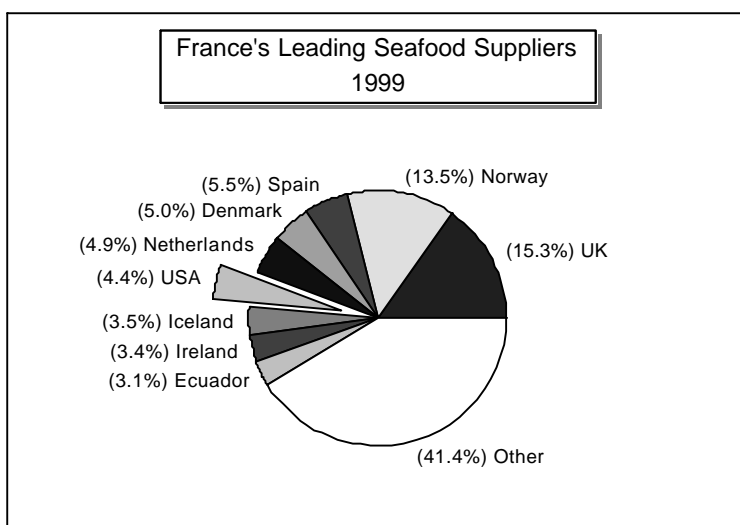
Total



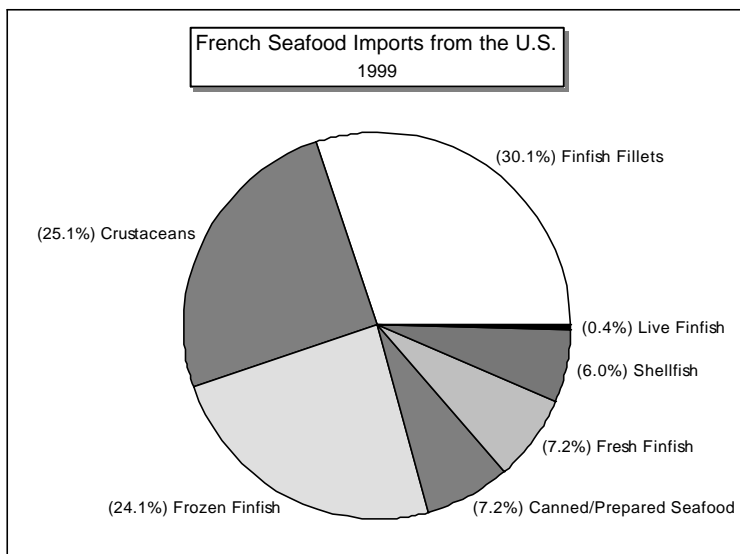
The opposite graph clearly shows that France is a big net importer of seafood. In 1999, France imported USD 2.15 billion more seafood than it exported.

In dollar terms, French imports of seafood products decreased by 7.5 percent to USD 3.20 billion in 1999 from 3.46 billion in 1998. In local currency, however, imports declined by 3.5 percent to FF 19.71 million in 1999 from FF 20.42 million in 1998.

French seafood imports mainly include live, fresh and frozen finfish, while the crustaceans and shellfish category ranks second, followed by prepared and canned seafood products, as indicated in the opposite graph.



France's leading suppliers of seafood products other than canned and prepared products are the United Kingdom and Norway. The United States ranked sixth in 1999, with USD 115 million.



Total U.S. exports of seafood products to France amounted to USD 123.58 million in 1999. The opposite graph gives a breakdown of these exports. Finfish fillets, frozen finfish and crustaceans represented almost 80 percent of U.S. shipments to France in 1999.

Salmon

Total French imports of salmon increased by 25 percent to 121,094 MT in 1999, as a result of larger shipments from Norway, the United Kingdom, the United States and the Faroe Islands. Imports from Norway and the United Kingdom accounted for 49 and 22 percent of total French imports, dominating the market. The market share of U.S. products amounted to 7.2 percent in 1999, up from 6.7 percent in 1998. U.S. shipments of salmon from the United States to France were abnormally low in 1998 because of difficult wild catch, and became closer to normal levels in 1999, although lower than in 1996 and 1997. American salmon suffers from the stiff price competition, as well as easier and faster transportation of Norwegian products on the French and European markets. Also, most salmon products imported by France from the United States are whole frozen salmon, while French consumer's preferences are for fillets and consumer-ready products.

Groundfish Fillets

France's leading suppliers of groundfish fillets in 1999 were China and Norway, with 22 and 13 percent of total French imports. Although U.S. shipments of groundfish fillets to France increased by 67 percent in 1999, they remained marginal at 3 percent market share. The bulk of U.S. shipments included frozen hake (83 percent). The remainder included frozen Alaska pollock (13 percent) and frozen cod (4 percent).

Lobster

In 1999, the United States became France's leading supplier of lobster, with 23 percent of the market, ahead of Canada (17 percent), which had been the leader in 1998. Most U.S. lobster shipped to France was live Homarus (77 percent), followed by frozen spiny lobster (21 percent) and frozen Homarus (1 percent). The largest American exporter of lobster to France is "East Coast Seafood," with one third of shipments.

East Coast Seafood

U.S. Office for International Sales: Tel: 1 781 593 1737

Fax: 1 781 593 9583

Contact in France: Tel: (33-1) 49 78 92 54

Fax: (33-1) 46 86 35 74

<http://www.mylobster.com>

Scallops

France's leading suppliers of scallops in 1999 were the United Kingdom (33 percent market share), Peru (15 percent), and Chile (12 percent). The United States supplied 4.4 percent of the French market. Since the EU ban on Chinese scallops, which were principally imported low-priced and frozen, France replaced Chinese products by scallops from Peru, Chile and Argentina. Frozen scallops from these countries are more price-competitive than U.S. products. The United Kingdom supplies France with fresh products as well as frozen products.

Surimi

The United States is, by far, France's leading supplier of frozen surimi base, with 73 percent of the French market in 1999.

Dogfish and Monkfish

The United States is France's leading supplier of dogfish, with 67 percent of total French imports in 1999. Similarly, the United States is France's leading supplier of monkfish, with 23 percent of the market, and followed by the United Kingdom (33 percent).

Marketing

Total Seafood

European Seafood Exposition (ESE) is the leading seafood show in Europe. It takes place annually in Brussels, Belgium, in April/May. The last ESE was held on May 9-11, 2000 in conjunction with Seafood Processing Europe (SPE). ESE 2000 contained 900 companies from 40 different countries present on 18,000 m² of exhibit place. There were 39 U.S. exhibitors at the American Pavilion and 10 other American exhibitors were in booths outside of the Pavilion.

[Http://www.euroseafood.com](http://www.euroseafood.com)

The International Food Show (SIAL) takes place every other year in Paris, France. It is the EU's leading food show along with Germany's ANUGA. SIAL will take place this year on October 22-26. There are 500 exhibitors expected from the seafood sector from all over the world.

[Http://www.sial.fr](http://www.sial.fr)

Sial@sial.fr

Tel: (33-1) 49 68 54 99

Fax: (33-1) 47 31 37 82

Organic

French consumers are increasingly attracted by organic products. Standards are on their way to being set for organic seafood produced through aquaculture to be labeled with the French organic logo "AB" (which stands for Agriculture Biologique). It is expected that the first seafood products with the "AB" label will be salmon farm-produced in Scotland and Ireland. Standards required are the following:

- water quality and control;
- low number of animals per volume of water;
- feed banned from animal-derived products but containing fish meal/oil or vegetables organically grown;
- no genetic modification;
- no hormone treatment;
- reduced stress (during sorting and transportation for example).

Salmon

Alaska Seafood Marketing Institute (ASMI) is the U.S. organization working on increasing U.S. wild salmon exports to France. ASMI's web site is : <http://www.alaskaseafood.org>

ASMI is represented in France by:

MARKONSULT

58, rue Pottier

78150 Le Chesnay

Tel: (33-1) 39 23 20 07

Fax: (33-1) 39 23 20 17

Lobster, monkfish and dogfish

American Seafood Institute (ASI) is the U.S. organization promoting exports of U.S. seafood from the East coast, and mainly lobster, monkfish and dogfish.

ASI/Rhode Island Seafood Council

212, Main Street, Suite 3

Wakefield

RI 02879

Tel: (401) 364 6185

Fax: (401) 789 9727